Job Aid: Claims Documentation

Purpose

This Job Aid is intended to outline expectations of adjusters, customer service reps, when taking a live call.

Teams Impacted

- Claims
- Customer service

Procedure

1. Greet the caller Thank you for calling AAS this is…. Can I please have your claim # or last 6 of the vin. Then follow Sop for Contract Holder Search & Verification to pull up the contract/claim information.

2. Now that the claim is pulled up you must read the detailed **[Notes]** for was last done. Make sure to search **[General]** to check for the status update note, look for the newest created date/time to the right of the screen.

3. Now is the time to verify where we are in processed on the claim so far, start by checking for the following:
   a. 3c's in detail
   b. Are records/tow bill needed?
   c. Customer statement noted
   d. Estimate keyed in
   e. Do we need to set inspector or have pictures sent in?
   f. Sourcing after failure demonstrated
   g. Key in most cost-effective part to claim

4. Depending on the notes will help see what steps from #3 you're on.

5. Process the missed information to help move the claim forward

6. If the caller needs to send any information or inspection has been sent out, a Pending Status note must be entered under General category. Make sure to include A-C so the next adjuster that gets that call on this claim keeps the claim moving in the same direction.
   a. What is needed from Repair facility?
   b. What is needed from the customer?
   c. Next step once information is collected

Notes

Category
General

Notes
Mike Jones at the RF verified failures to ac still needs more diag on engine to get to pof
CH sent in all information needed waiting to auth TEARDOWN to RF to pof,
Mike will get auth from ch to open timing cover of engine to verify failure will call back with estimate

Cancel   Save

Save Notes

IMPORTANT: Ensure you are setting your status note under the General category. This will provide an easier means of sorting notes.

7. If you have collected the detailed information and you can auth the claim, let's get the claim authorized.

8. If the claim is denied, please make sure you note the claim in detail on why claim is denied and follow the denial process per SOP.

9. Once you have made movement on the claim as a courtesy to the assigned adjuster, send them a **[Task]** of the updated information made on the claim.

Approval & Revision

Date Created 5/13/2022	Created By Johnnie Martinez		Date Approved 5/17/2022	Approved By Jason Dolan	
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